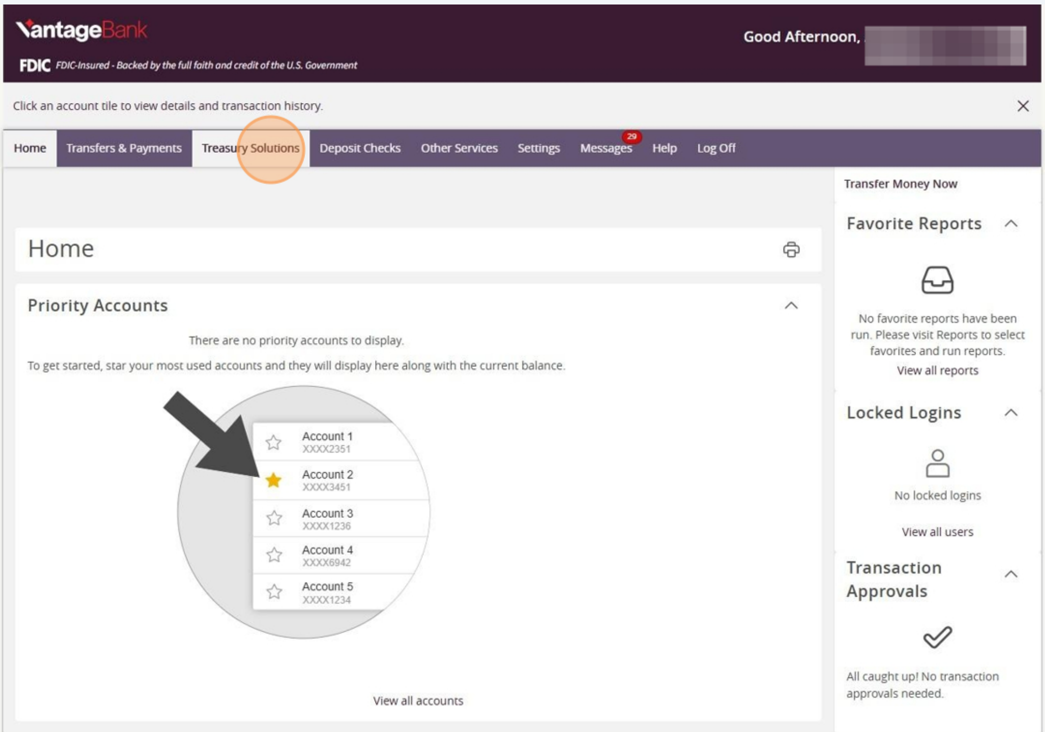
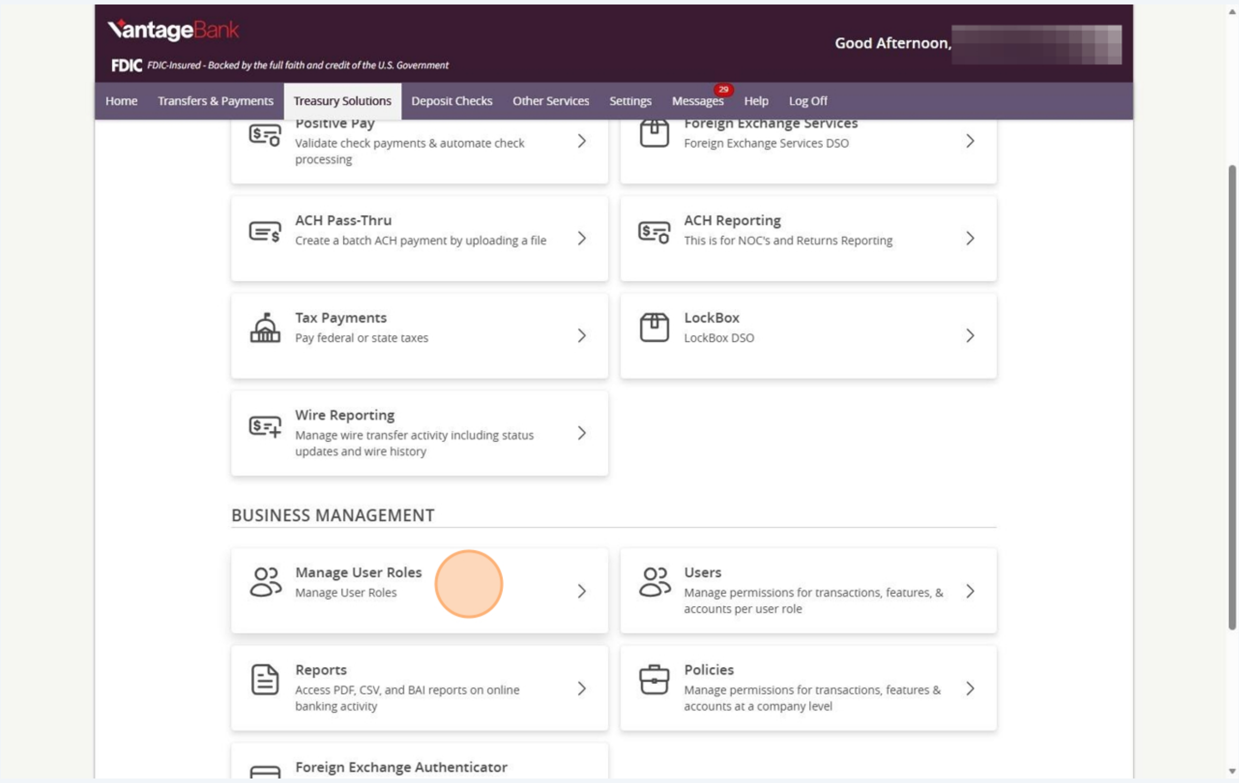
Access to new accounts (Corporate)

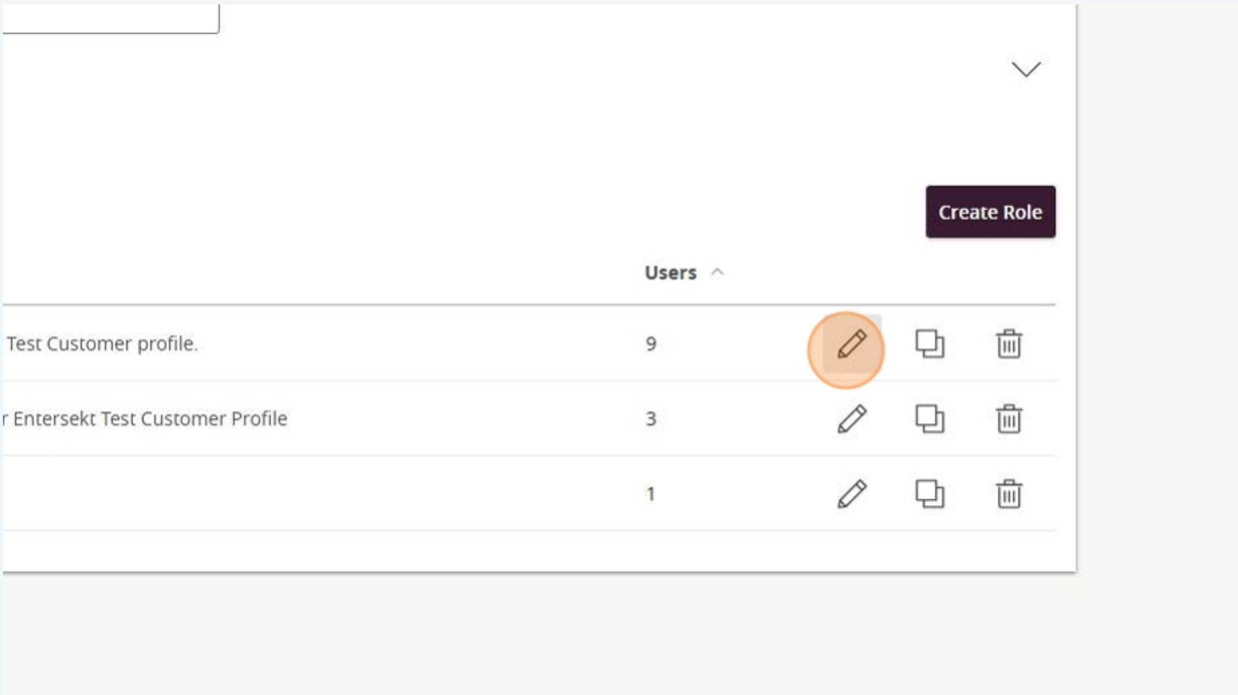
1 Click "Treasury Solutions"



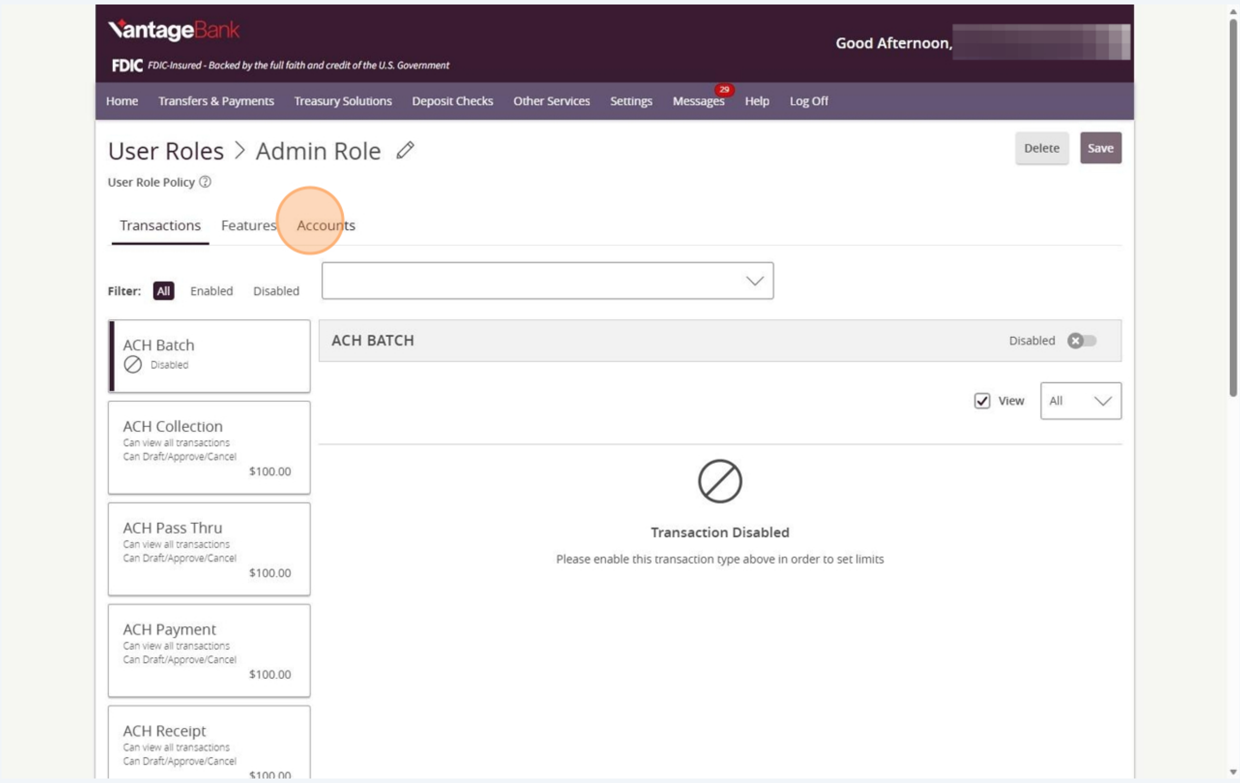
2 Click "Manage User Roles"



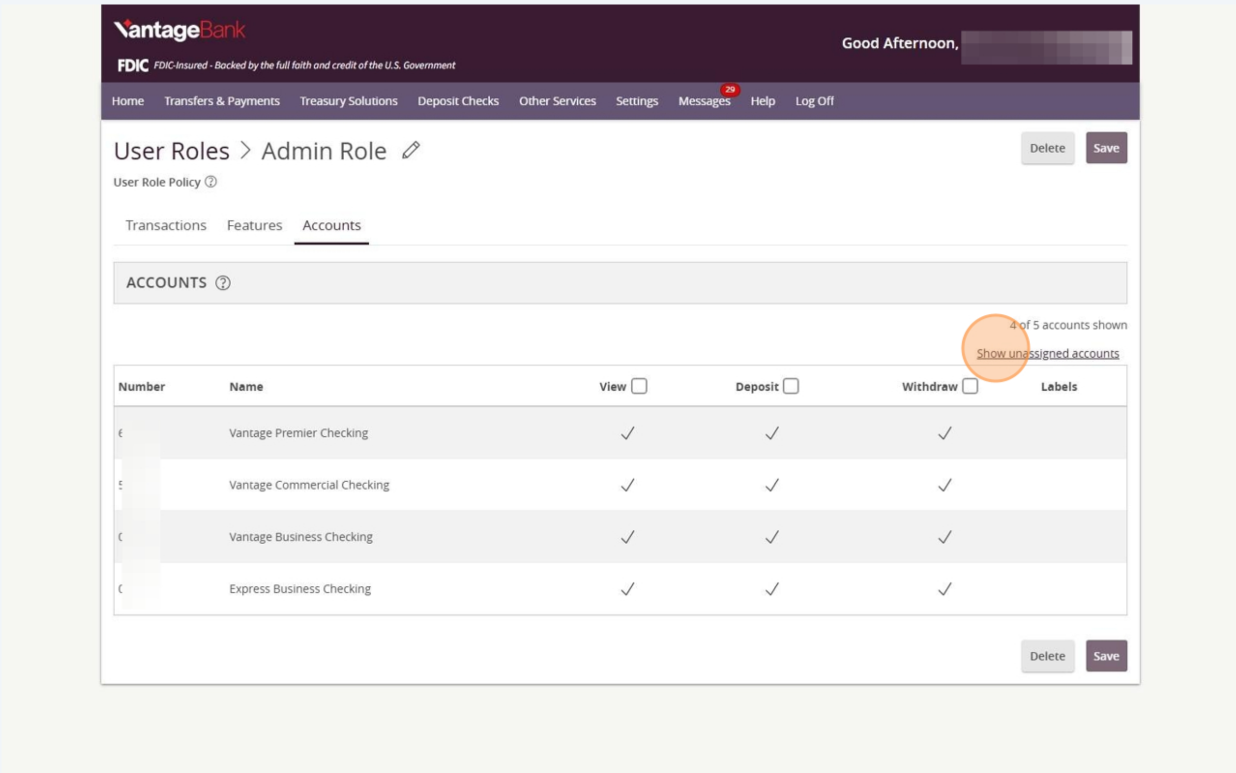
3 Click the pencil icon next to your role to edit it.



4 Click "accounts"



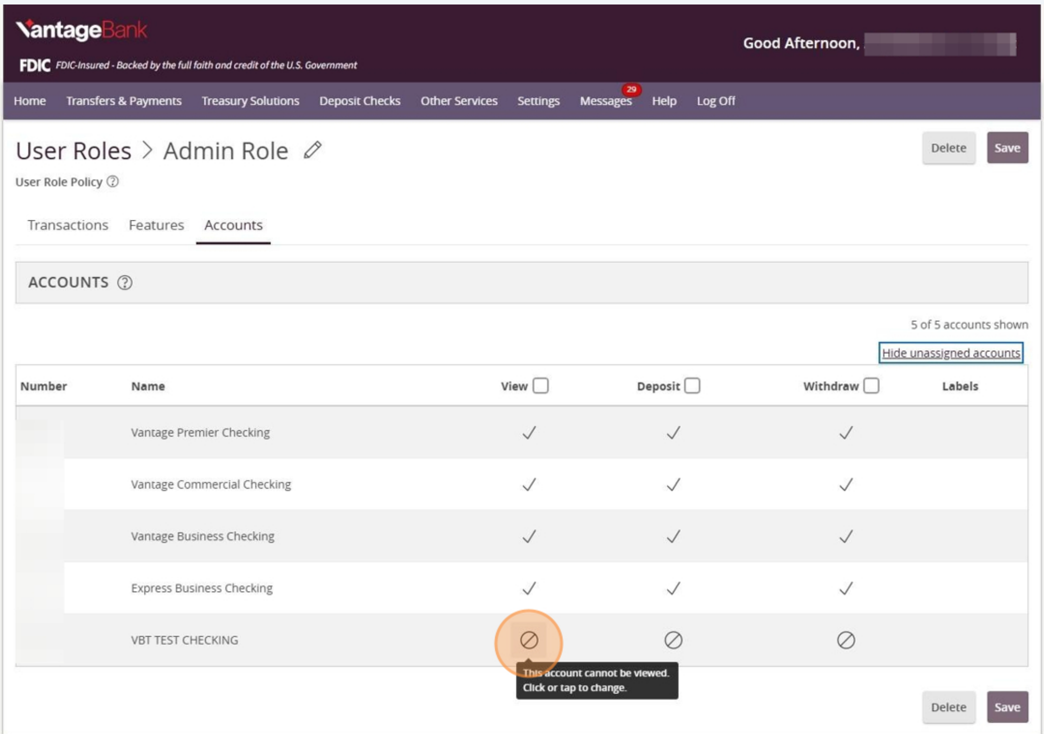
5 Click "Show unassigned accounts"



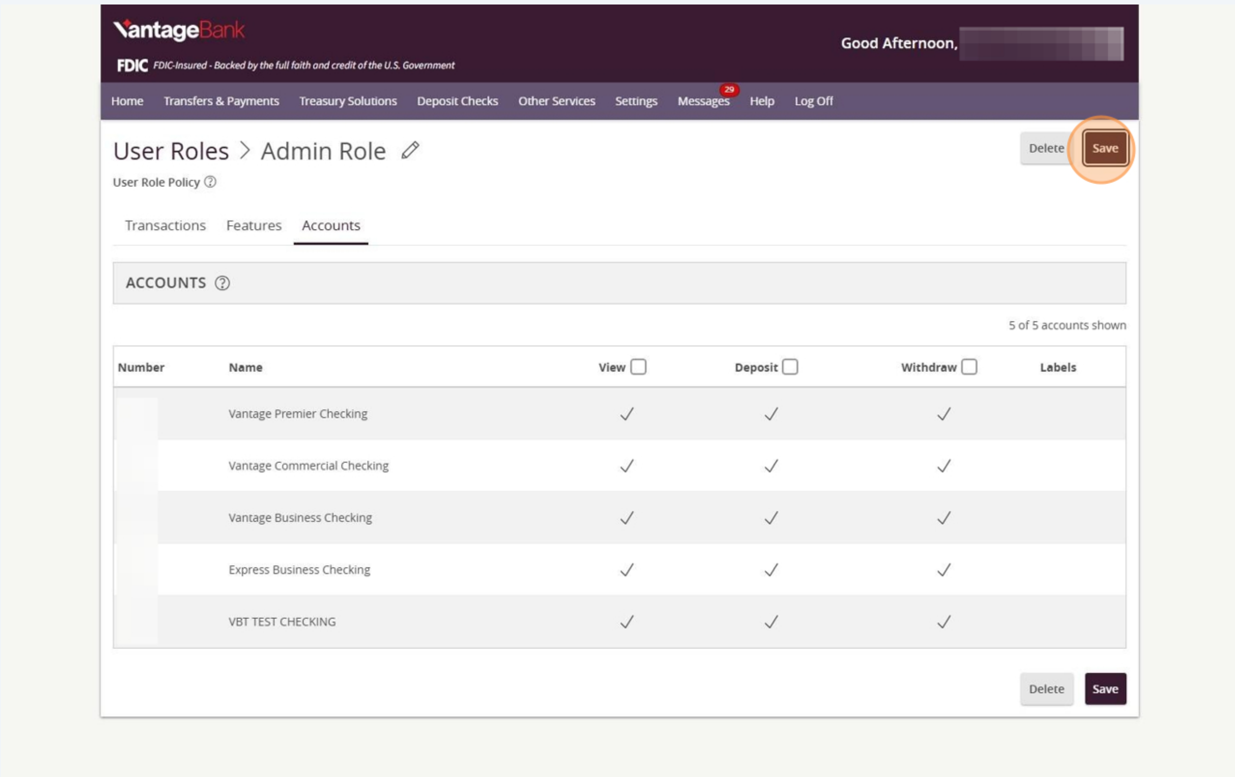
6

Click the void icons to convert them into check marks.

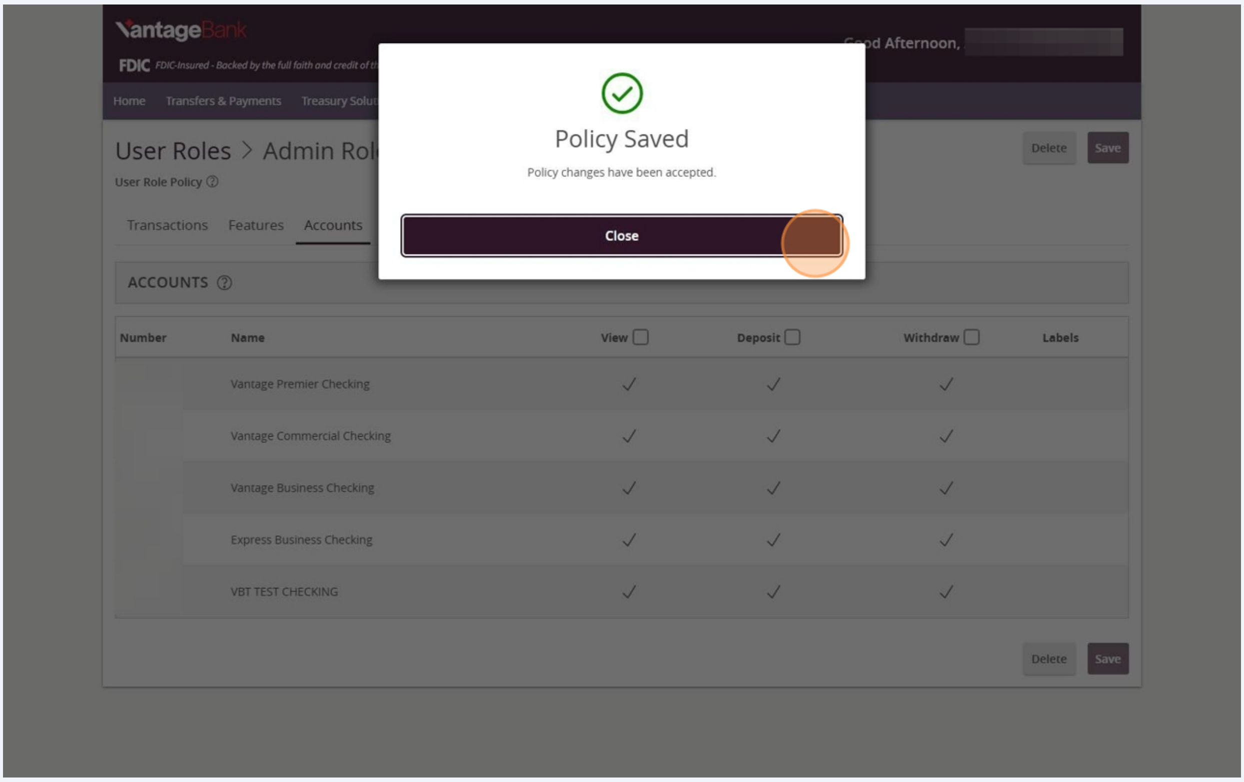
When assigning access to additional roles, ensure that only the appropriate options are selected based on the type of access required.



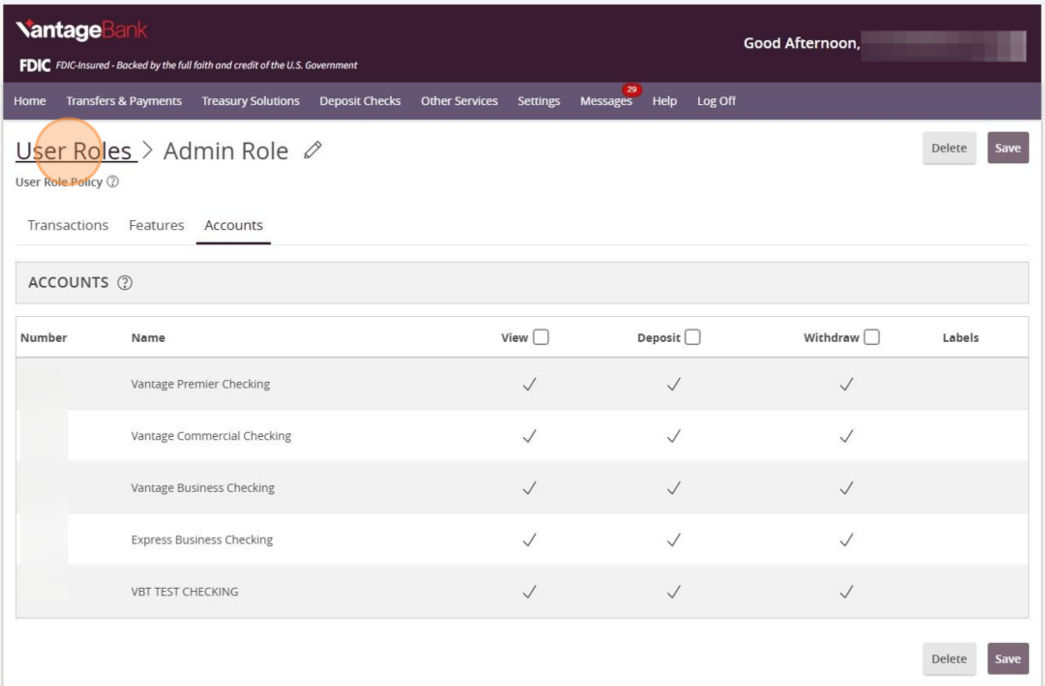
7 Click "Save"



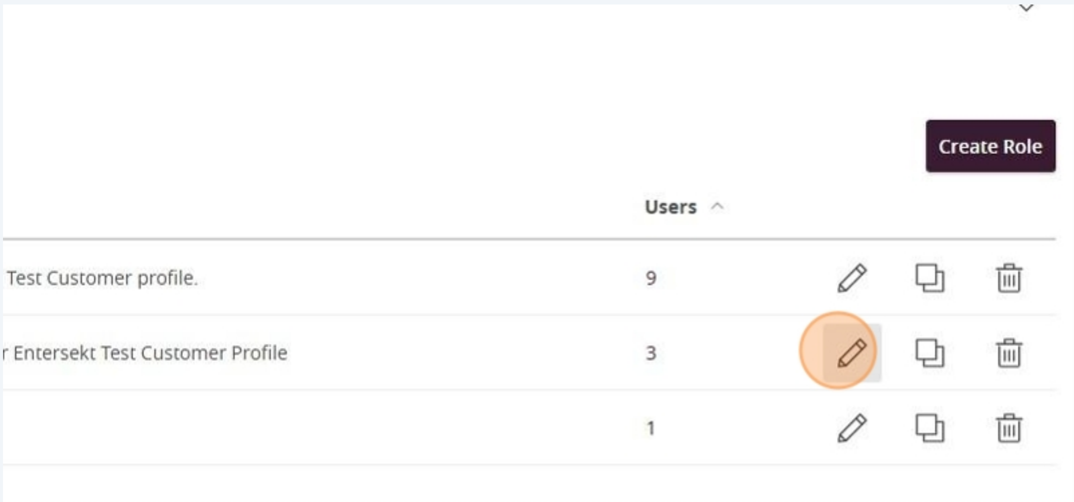
8 Click "Close"



9 To grant access to other users, click on “User Roles” located at the top of the screen.



10 Click the pencil icon to edit the user’s role, then repeat the steps 4-8 outlined above.



11 If transaction access needs to be granted, please follow these steps:

1. Navigate to the **Transactions** tab.
2. Select the appropriate **transaction type**.
3. Go to **Allow Actions**.
4. Click the **three dots** to edit the action.
5. Ensure the **"Any Allow Account"** option is selected.
6. Save your changes.